2020

Strategy Evolution: A New Paradigm

The Partnership Funds
Building independent political power
Gratitude

going out to our grantee partners, staff, board and leadership team of The Partnership Funds. The co-creators in these conversations include:

Arabella Advisors • BISC • Black PAC • BOLD • Center for Civic Policy • Community Building Strategies • CTUL Centro Trabajadores Unidos en la Lucha • Economic Democracy • EJAM Economic Justice Alliance of Michigan • Equality Virginia • Ford Foundation • General Service Foundation • Irving Harris Foundation • Amalgamated Foundation • ISAIAH MN • Land Stewardship Project • Minnesota Voice • Missouri Jobs with Justice • Mothering Justice • New Florida Majority • New Virginia Majority • Ohio Organizing Collaborative • Ohio Transformation Fund • Ohio Voice • OLÉ • OutFront MN • ProGeorgia • Project Runway • ProgessVirginia • Rockefeller Brothers Foundation • South Carolina Progressive Network • Southern Partners Funds • TakeAction Minnesota • The Minneapolis Foundation • VA Progressive Leadership Pipeline • We the People Michigan

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Special appreciation to the artists and creators who specifically inspired us through this journey:

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Why this, Why now?

Few things have illuminated the interconnected nature of our world as acutely as the Covid-19 crisis. The virus has only triggered an urgent medical crisis, but also exposed larger structural crises, the weakening of the public sphere, exacerbated a global uprising followed by widespread unemployment, and an ongoing vacuum of moral leadership. We watch the crisis of capitalism and compounded racism implode and create openings for new ways of relating to each other and being in the world. The tension between the rights of individuals and the most benevolent outcome for the majority contend. For example, some refuse to wear a mask as a personal inconvenience leaving front line workers and their families exposed. The question facing the Partnership Funds, its allies, and the movement at large is how to shift from a culture of extractraction, greed, individualism to one of integration, regeneration and collective and mutual benefit as central values that guide our lives together on the other side of this crisis.

Partnership Funds has worked to advance Independent Political Power since 2014. Inherent in this strategy is investing in our grantee partners that build power for the community to contend for its mutual benefit at the state level. The Partnership Funds key grantee allies worked to build model progressive infrastructure in New Mexico, Virginia, Ohio, Minnesota and Michigan. We knew the work of the next decade must build on this legacy in founding states, and grow with grantee allies in Florida, Missouri.

Five years into its foundational strategy, we initiated a series of conversations with our funding partners, grantees, and friends in the movement ecosystem to assess the situation (amidst ever quickening upheaval) and how our strategies can and must evolve. We launched 2020 with a new North Star Vision. The intention was to host a retreat amongst Partnership Funds grantees during the spring of 2020 around how to evolve our strategies and move, together, towards this refined vision. Due to the Pandemic we instead hosted a series of virtual spaces. We shared culture and conversation to collectively sense-make, heal, and assess what our leaders and the work demands. This document captures what we heard from our community, what we’ve collectively learned about what’s come before, and what must come next.

We continue to evolve and adapt our work supporting Independent Political Power. The lessons and ideas you’ll see below are the culmination of thinking from across the Partnership Funds states, grantees, foundation partners, leaders, teachers, artists, and friends. The question that we were left with will guide our work. Our refinements are rooted in a commitment to be more transparent, more accountable, and more inclusive in the future.

“All that you touch you Change. All that you Change Changes you. The only lasting truth is Change. God Is Change.”
- Octavia Butler
History and Pre-planning

In 2019 The Partnership Funds (TPF) hired its second executive director. By the end of the year, with this new executive leadership, the board developed a North Star vision to advance authentic partnership.
Lessons IN NEW MEXICO

- Work every little election to activate low-propensity voters over time
- Expanding the # of organizations with field capacity is critical to expand movement capacity
- Consultants’ power-building limits movement organizations’ power
- IVE works. Year-round organizing, education, and multiple contacts with NAM constituencies is effective.
- Building a coordinated civic engagement sector (C3 & C4) has been effective in building our sector’s political power. There is increasing recognition by elected officials at the state level that our sector helps to get/elect them elected.

New-Mexico

<table>
<thead>
<tr>
<th>YEAR</th>
<th>POLITICAL LANDSCAPE</th>
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<tbody>
<tr>
<td>2010</td>
<td>BACA Minimum wage passes</td>
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<tr>
<td>2011</td>
<td>Appleseed for CA endorsed Sen. Shank rich to the US which with a GEP which had held the seat from the 1980s until 2008</td>
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<tr>
<td>2012</td>
<td>Money talks in CA continues, US continues by new bar/ship in House &amp; Senate, signed by Gov. Martinez, Cast CA state budget 4.2 million per year</td>
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<tr>
<td>2013</td>
<td>BACA's state NM House, Gov. Martinez re-elected</td>
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<tr>
<td>2020</td>
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INFRASTRUCTURE ORGANIZATIONS

2010
- C3 staff helps to establish NM Vote Matters. NMN leads statewide voter registration efforts in 2012
- Over 3,000 New Mexicans from historically underrepresented communities are registered to vote

POLITICAL CAPACITIES

2010
- NM NRM launches legislative accountability campaign against Democratic House leadership for passing mansionogram

2011
- NM NRM moves to year-round canvass & engagement

2012
- NM NRM launches NM - NM House member, Gov. Martinez appointed to Senate

2013
- NM NRM launches NM - NM House member, Gov. Martinez appointed to Senate

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- NM NRM launches NM - NM House member, Gov. Martinez appointed to Senate

FORMALIZED COMMITTEE RECOMMENDATIONS TO NEW GENERATIONS
Lessons in Missouri

- Solidarity is a process
- Democracy requires many voices
- Tensions need to be worked through, not papered over
- Losses and set-backs teach as well as victories
- Anti-racism is a journey not a destination
- Our issues resonate with Missouri voters, despite a disconnect with candidates

Notes:

- Focus shifts to building a strategy for the next round of civic engagement
-_scene of a protest

North Carolina

- Jobs and infrastructure issues
- Political landscape and capacities

2010
- Republicans take over legislature
- North Carolina coalition
- Ballot measures on gun rights, labor, and education

2011
- McCrory wins re-election
- North Carolina coalition
- Ballot measures on gun rights, labor, and education

2012
- Alliance for Progress
- North Carolina coalition
- Ballot measures on gun rights, labor, and education

2013
- Incumbent wins re-election
- North Carolina coalition
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- Alliance for Progress
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Covid19 response

As the true scope of the Pandemic came into shape, the funds hosted a series of grantee conversations to assess what was needed through this rapid upheaval. We heard about this moment of transition to deep, digitally driven relational organizing, of ever expanding mental health needs amongst leaders, organizers, and the communities we serve. We heard leaders discuss scenarios to inform organizing and narrative campaigns to support public support systems.

We heard the request for space to reconsider and the big picture and strategies of the work as the ground shifts daily and mutual aid takes front and center. We were encouraged to not cancel the planned grantee retreat, but instead repurpose and reshape. We re-designed the in-person retreat into a series of four meetings over the course of May and June.

Situational Analysis

Our first need was to come together from different states, experiences, and roles to sense how the situation is shifting. We mapped out 13 dimensions of change, and small groups explored how that dimension could shift over the next 6 months, 1 year, and 2 years. We used our collective experience and smart strategies for this analysis, as well as different ways of knowing and sensing. We drew on the traditions of afro-futurism to help uncover the future despite massive uncertainty.

<table>
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<th>DIMENSION:</th>
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<td>Indicate the dimension of change you discussed above.</td>
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Consider the question prompts provided with your chosen dimension in the workbook. With your group, envision the following scenarios for the different time frames.

<table>
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<tr>
<th></th>
<th>6 MONTHS</th>
<th>1 YEAR</th>
<th>2 YEARS</th>
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</thead>
<tbody>
<tr>
<td>What could happen?</td>
<td>What is likely to happen?</td>
<td>What do we want to happen?</td>
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While the discussions were provocative, and helped us all expand our thinking about what is both possible and needed, the real reminder of this first meeting was in the importance of finding the space to dream together; to connect to each other, and ourselves. Grantee partners reflected on the desire to have an economic framework that recovers basic human dignity and values life and shared prosperity. They discussed the importance of countering false narratives between a healthy economy and healthy populace. Our grantees spoke to their desire to see ongoing engagement; equitable and inclusive transparent processes where the government organizes public resources for the benefit of the public. Insights were shared about the opposition's tactics. For instance one grantee noted that the republicans had doubled their litigation budget. Our partners then spoke to interventions and strategies to support absentee voting.

The situational analysis was drafted as a reusable toolkit that grantee and movement partners went on to use with their own communities to support taking stock, regrounding, and situating towards a new vision and strategy through this moment of intensified upheaval.

“There are no shortcuts to the power we need to build. Connection carries the message. While there are so many barriers, people feel more connected to themselves. We are the architects of connection...”

- TPF Grantee
Infrastructure Assessment

While connecting into tools for sensing changes in what was possible, our next focus was on conjuring the infrastructure we need most. This began with exploring our shared history: how did our current infrastructure come to be? Where is our infrastructure well equipped to help us move through this situation? What’s working? Where is it POORLY equipped to help us move through this situation? What’s the infrastructure we need in this moment to adapt and lead for both the now and the long term?

In 2003, the progressive movement was forever changed when leaders began to focus on the sophistication of the infrastructure on the right - media, leadership development, training, organizing and funding - working in alignment to advance their worldview - as a key challenge to progressives. With fervor, leaders at the national and state level worked together, mirroring the right - to build progressive infrastructure that reduced duplication, increased scale and sophistication with data, tools and technology.

What we heard is that the old model of infrastructure was developed to mirror the right, and the evolved model must center what real people need. This can include additional security, healing support and direct service. The old model centered scale and a tactical attack; the evolving model must center relationships, trust, and the spaces to become whole. We would benefit immensely from more meaning-making infrastructure to connect and share narratives that change what’s possible. We must be intentional about the narrative we want to create in the next decade. The old way centered on extracting votes from the community in the name of power. The evolved model must invest resources and power in community based organizations (membership based where feasible) to make meaning of the vote. We must work through bases organized into democratic institutions. The old infrastructure was donor driven. Our evolved infrastructure will be self-determined. To do this, we must invest in and generate more truly self determined money.
Independent Resource Generation

Our third meeting explored independent resource generation, because in order to create our future infrastructure, we must think about the structures of resources, fundraising, and tax codes that support what’s possible. This is about really creating the space for risk, innovation, and liberation. This is how we invest in leaders and the work over time, accountable to base. We heard various experiments and ways those in our community are exploring new ventures and ways to generate this sustaining, independent money: from robust membership programs, to signature gathering ventures, even breweries generating revenues. There was a call for spending 10% of our resources exploring these innovative ideas and ventures to help build a future that gets our leaders off the hamster wheel of fundraising, creating space to truly lead.

Structure - Trust Based to Democratic Philanthropy - conceding power in philanthropy.

The final virtual retreat kicked off a process to evolve the funds structure and decision-making. While we’ve always been a foundation led by the field, it was clear there is more we can do to fully embrace our values and work towards liberation in this ongoing journey to build the infrastructure the field needs. We discussed different models of how other funders and donors have ceded control in their decision-making structure in order to be more democratic.

What we heard was an excitement and appreciation about the opportunity to experiment and learn about other ways to organize the work of grantmaking. There was a recognition that we’re “standing on the shoulders of giants” like the Southern Partners Fund and others as we work to push, strategically, around what a robust, multi-racial democracy might look and feel like inside our own institution. We’re eager to practice, experiment, and build the world we want to live in closest to home. We are feeling the “Beautiful possibility in what this can look like to have the funds rooted legitimately in folks on the ground driving work.” We also recognize that in order to make that a reality, it is really important to understand the buy-in and commitment across the board. This will be WORK. It will take time.

We should plan and treat this as an organizing campaign. It matters too much to approach it with urgency and impatience.
Alignment Moving Forward

Six months after this conversation began, we’ve heard clearly the need to bring our internal culture and strategy more deeply into alignment with our North Star Vision. We must become the self-determined infrastructure of the future the field is calling out for. While building on a legacy of work, we named refinements for the future which include:

• New experiments and explorations into independent resource generation. How do we create space for 10% investment in risk and innovation?

• An evolved, more democratic and transparent structure for governing the funds. How do we continue to heal colonial legacies in our selves and organization to build new ways of working truly accountable to those closest to the pain?

• Shift and additions in our grantmaking to really strengthen the leadership of black, latinx, API and indigenous communities. How can we continue to evolve the IPO model and approach to include more membership based black led organizations?

All this requires building the Partnership Funds teams and staff to support this work. As the team grows over the remainder of this year, we will work with a North Star Committee consisting of our existing funders to stay true to this evolving strategy. We are also recruiting a New Paradigm Committee to invest the time and leadership in uncovering the evolved structure that will bring alignment and accountability to our work. We are eager and ready to continue this journey of creation with you all.